OMB No. 1545-0092 U.S. Fiduciary Income Tax Return For the calendar year 1984 or fiscal year beginning....., 1984, and ending....., 19....., 19..... Internal Revenue Service Name of estate or trust (Grantor type trust, see instructions) Employer identification number Check applicable boxes: Decedent's estate ☐ Simple trust (\$300) Name and title of fiduciary Nonexempt charitable and split-interest Complex trust (\$100) trusts check applicable boxes (See Complex trust (\$300) instructions): Address of fiduciary (number and street) Grantor type trust Described in section 4947(a)(1) Ancillary return ■ Not treated as a private City, State, and ZIP code Bankruptcy estate foundation ☐ Generation-skipping trust Described in section 4947(a)(2) ☐ Testamentary trust For Paperwork Reduction Act Notice, ☐ First return ☐ Final return ☐ Amended return ☐ Family estate trust see page 1 of the instructions. Change in fiduciary's ▶ Name or ☐ Address Pooled income fund 1 Dividends (enter full amount before exclusion) 2 2 Interest income (enter full amount before exclusion) 3 5a Gross rent and royalty income _____; b Less total expenses (attach schedule) _____ 5c 6 Net business and farm income or (loss) (attach Schedules C and F (Form 1040)) 7 9 9 Other income (state nature of income) 10 Total income (add lines 1 through 9) 10 11 11 12 12 Taxes 13 13 14 15 15 Attorney, accountant, and return preparer fees 16 16 Other deductions (attach a separate sheet listing deductions) . . . 17 17 18 18 Adjusted total income or (loss) (Subtract line 17 from line 10) 19 19 Income distribution deduction (from Schedule B, line 19) (see instructions) (attach Schedule K-1 (Form 1041)) 20 20 21 21 22 22 Long-term capital gain deduction from Schedule D (Form 1041) (Charity—see instructions) . 23 23 24 24 **Total** (add lines 19 through 23) Taxable income of fiduciary (subtract line 24 from line 18) 25 25 26c 26 Tax: a Tax rate schedule ; b Other tax ; Total ▶ 27d 27 Credits: a Foreign tax....; b Nonconventional Fuel....; c Research; Total ▶ 28 Credits: ☐ Form 3800 ☐ Form 3468 (see instructions) ☐ Form 5884 ☐ Form 6478 28 29 29 **Total** (add lines 27d and 28) 30 31 Recapture of investment credit (attach Form 4255). 31 32 32 Alternative minimum tax (attach Form 6251) 33 33 34d Credits: a Form 2439.....; b Form 4136.....; c Form 6249......; Total ▶ 34 35c Federal income tax: a Previously paid ► ; b Withheld ► ; Total ► 35 36 36 37 37 Balance of tax due (subtract line 36 from line 33) (see instructions) 38 Overpayment (subtract line 33 from line 36) Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than fiduciary) is based on all information of which preparer has any knowledge. **Please** Sign Here Signature of fiduciary or officer representing fiduciary Date Date Check if Preparer's social security no. Preparer's **Paid** self-emsignature ploved Preparer's

E.I. No. ▶

ZIP code ▶

Firm's name (or

and address

yours, if self-employed)

Use Only

| Do not complete | Schedules A at | nd B for a simi | ple trust or a | pooled income fund. |
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| (Write the name and address of each charitable organization to whom your contributions total \$3,000 or more on an antitached sheet.) 1. Amounts paid or permanently set aside for charitable purposes from current year's gross income. 2. Tax-exempt interest allocable to charitable distribution (see instructions). 2. Complete lines 3 through 6 below only if gain on Schedule D (Form 1041), line 16, column (b). 2. Complete lines 3 through 6 below only if gain on Schedule D (Form 1041), line 16, column (b). 3. Long term capital gain included on line 1 (see instructions). 3. Long term capital gain included on line 1 (see instructions). 4. Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c). 5. Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c). 5. Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c). 5. Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c). 5. Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c). 5. Enter gain from Schedule D (Form 1041), line 16, column (c). 7. Add line 2 and line 6. 8. Balance (subtract line 7 from line 1) 8. Balance (subtract line 7 from line 1) 9. Enter the net short-term capital gain and 40% of the net long-term capital gain of the current tax year allocable to copus, paid or permanently set aside for charitable purposes from gross income of a prior year (See instructions). 10. Add schedule A (Line 2) (Line 14 | SC | HEDULE A.—Charitable Deduction | | | _ |
|--|----|--|--------------------------------|---|------|
| 2 Tax-exempt interest allocable to charitable distribution (see instructions) (Complete lines 3 through 6 below only if gain on Schedule D (Form 1041), line 16, column (b), exceeds ioss on Schedule D (Form 1041), line 15, column (b), 3 3 Long-term capital gain included on line 1 (see instructions) 4 Enter gain from Schedule D (Form 1041), line 16, column (b), minus loss on Schedule D (Form 1041), line 15, column (b), minus loss on Schedule D (Form 1041), line 15, column (b), despite the gain from Schedule D (Form 1041), line 16, column (b), minus loss on Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 17, column (c), despite the schedule D (Form 1041), line 17, column (c), despite the gain from Schedule D (Form 1041), line 17, column (c), despite the gain from Schedule D (Form 1041), line 17, column (c), line 17, column (c), line 17, column (c), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule | _ | (Write the name and address of each charitable organization to whom your contribut | ions total \$3,0 | 000 or mo | re |
| 2 Tax-exempt interest allocable to charitable distribution (see instructions) (Complete lines 3 through 6 below only if gain on Schedule D (Form 1041), line 16, column (b), exceeds ioss on Schedule D (Form 1041), line 15, column (b), 3 3 Long-term capital gain included on line 1 (see instructions) 4 Enter gain from Schedule D (Form 1041), line 16, column (b), minus loss on Schedule D (Form 1041), line 15, column (b), minus loss on Schedule D (Form 1041), line 15, column (b), despite the gain from Schedule D (Form 1041), line 16, column (b), minus loss on Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 15, column (c), despite the gain from Schedule D (Form 1041), line 17, column (c), despite the schedule D (Form 1041), line 17, column (c), despite the gain from Schedule D (Form 1041), line 17, column (c), despite the gain from Schedule D (Form 1041), line 17, column (c), line 17, column (c), line 17, column (c), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule D (Form 1041), line 17, column (c), line 16, schedule | | | 1 | | |
| (Complete lines 3 through 6 below only if gain on Schedule D (Form 1041), line 16, column (b), exceeds loss on Schedule D (Form 1041), line 15, column (b). 3 | | | | | _ |
| exceeds loss on Schedule D (Form 1041), line 15, column (b). 3 | 2 | | | | |
| 3 Long-term capital gain included on line 1 (see instructions) 4 Enter gain from Schedule D (Form 1041), line 15, column (b) 5 Enter gain from Schedule D (Form 1041), line 15, column (c) 6 Enter 60% of the amount on line 3, 4, or 5, whichever is the smallest. 7 Add line 2 and line 6. 8 Balance (subtract line 7 from line 1) 9 Enter the net short-term capital gain and 40% of the net long-term capital gain of the current tax year allocable to corpus, paid or permanently set aside for charitable purposes 10 Amounts paid or permanently set aside for charitable purposes from gross income of a prior year (see instructions) 11 Total (add lines 8, 9, and 10). Enter here and on page 1, line 14 SCHEDULE B.—Income Distribution Deduction 12 Tax-exempt interest, as adjusted (see instructions) 13 Allotsed total income (Enter amount from page 1, line 18)(If net loss, enter zero) 14 Add Schedule A, line 9, and ½ of Schedule A, line 6 15 Short-term capital gain included on Schedule A, line 6 16 If amount on page 1, line 7, is a loss, enter amount here as a positive figure 17 Total (add lines 1 through 6) 18 If amount on page 1, line 7, is a loss, enter amount here as 9 10 If the mount on page 1, line 7, is a loss, enter amount here as 9 10 In complete trust, amount of income for the tax year determined under the governing instrument (accounting income) 19 If a complete trust, amount of income for the tax year determined under the governing instrument (accounting income) 10 If a complete trust, amount of income for the tax year determined under the governing instrument (accounting income) 11 Amount of income required to be distributed currently (see instructions) 12 Other amounts paid, credited, or otherwise required to be distributed (see instructions) 13 Total (add lines 11 and 12) (fire great than line 10), see instructions) 15 Balance (subtract line 14 from line 13) 16 Enter distributable net income form line 9 17 Enter the total of tax-exempt income included on lines 11 and 12, as adjusted (see instructions) 18 Balance (s | | | <i>\(\(\(\(\(\) \) \)</i> | | |
| Enter gain from Schedule D (Form 1041), line 15, column (b), minus loss on Schedule D (Form 1041), line 15, column (b) 5 Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c) 5 Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c) 6 Enter GoW of the amount on line 3, 4, or 5, whichever is the smallest . 7 Add line 2 and line 6. 8 Balance (subtract line 7 from line 1) 9 Enter the net short-term capital gain and 40% of the net long-term capital gain of the current tax year allocable to corpus, paid or permanently set aside for charitable purposes from gross income of a prior year (see instructions) 11 10 Amounts paid or permanently set aside for charitable purposes from gross income of a prior year (see instructions) 11 11 Total (add lines 8, 9, and 10). Enter here and on page 1, line 14 Check box, if Section 643(d)(3) election is made (Attach Schedule D (Form 1041)) 11 11 Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero) 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | | | 1 | | |
| Enter gain from Schedule D (Form 1041), line 16, column (c), minus loss on Schedule D (Form 1041), line 15, column (c) 6 Enter 60% of the amount on line 3, 4, or 5, whichever is the smallest. 7 Add line 2 and line 6. 8 Balance (subtract line 7 from line 1) 9 Enter the net short-term capital gain and 40% of the net long-term capital gain of the current tax year allocable to corpus, paid or permanently set aside for charitable purposes 10 Amounts paid or permanently set aside for charitable purposes from gross income of a prior year (See instructions) 11 Total (add lines 8, 9, and 10). Enter here and on page 1, line 14 SCHEDULE B.—Income Distribution Deduction Check box, if Section 643(d)(3) election is made (Attach Schedule D (Form 1041)) 1 Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero) 1 Add Schedule D (Form 1041) 1 Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero) 2 Tax-exempt interest, as adjusted (see instructions) 3 Net gain shown on Schedule D (Form 1041)) 1 Add Schedule A, line 9, and % of Schedule A, line 6 5 Short-term capital gain included on Schedule A, line 1 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure 7 Total (add lines 1 through 6) 7 If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income) 10 If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income) 11 Amount of income required to be distributed currently (see instructions) 11 Complex trust, amount of income for the tax year determined under the governing instrument (accounting income) 12 Complex trust, amount of income included on lines 11 and 12, as adjusted (see instructions) 13 Total (add lines 11 and 12) (If greater than line 10, see instructions) 14 Enter the total of tax-exempt income included on lines 11 and 12, as adjusted (see instructions) 15 Balance (subtract line 14 from line 13) 16 Enter the total of tax-exemp | | | | | _ |
| 6 Enter 60% of the amount on line 3, 4, or 5, whichever is the smallest | 4 | Enter gain from Schedule D (Form 1041), line 16, column (b), minus loss on Schedule D (Form 1041), line 15, column (b) | | | _ |
| 7 Add line 2 and line 6. 8 Balance (subtract line 7 from line 1) 9 Enter the net short-term capital gain and 40% of the net long-term capital gain of the current tax year allocable to corpus, paid or permanently set aside for charitable purposes 10 Amounts paid or permanently set aside for charitable purposes income of a prior year (see instructions) 11 Total (add lines 8, 9, and 10). Enter here and on page 1, line 14 SCHEDULE B.—Income Distribution Deduction 1 Adjusted total income (Enter amount from page 1, line 18)(if net loss, enter zero) 1 Adjusted total income (Enter amount from page 1, line 18)(if net loss, enter zero) 2 Tax-exempt interest, as adjusted (see instructions) 2 Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero 3 Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero 4 Add Schedule A, line 9, and 35 of Schedule A, line 6 5 Short-term capital gain included on Schedule A, line 6 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure 7 Total (add lines 1 through 6) 8 If amount on page 1, line 7, is a gain, enter amount here 9 Distributable net income (subtract line 8 from line 7) 10 If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income) 11 Amount of income required to be distributed currently (see instructions) 12 Other amounts paid, credited, or otherwise required to be distributed (see instructions) 11 Equation of the amount from line 9 12 Other amounts paid, credited, or otherwise required to be distributed (see instructions) 12 There the amount from line 9 15 Balance (subtract line 17 from line 16) 16 Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or line 18, whichever is less. Other Information 1 Date trust was created or, if an estate, date of decedent's death which existed counts a signature or other authority over a bank account, securities account, or other linearies | | | | | - |
| 8 Balance (subtract line 7 from line 1) 9 Enter the net short-term capital gain and 40% of the net long-term capital gain of the current tax year allocable to corpus, paid or permanently set aside for charitable purposes 10 Amounts paid or permanently set aside for charitable purposes from gross income of a prior year (see instructions) 11 Total (add lines 8, 9, and 10). Enter here and on page 1, line 14 SCHEDULE B.—Income Distribution Deduction Check box, if Section 643(d)(3) election is made (Attach Schedule D (Form 1041)) 1 Adjusted total income (Enter amount from page 1, line 18)(if net loss, enter zero) 1 Adjusted total income (Enter amount from page 1, line 18)(if net loss, enter zero) 2 Tax-exempt interest, as adjusted (see instructions) 3 Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero 3 At Add Schedule A, line 9, and 3⁄c of Schedule A, line 6 5 Short-term capital gain included on Schedule A, line 1 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure 6 If amount on page 1, line 7, is a gain, enter amount here as a positive figure 7 Total (add lines 1 through 6) 8 If amount on page 1, line 7, is a gain, enter amount here as a positive figure 9 Distributable net income (subtract line 8 from line 7) 10 If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income) 11 Amount of income required to be distributed currently (see instructions) 12 13 Total (add lines 11 and 12) (if greater than line 10, see instructions) 13 14 Center distributable net income from line 9 17 Enter the amount from line 2 18 Balance (subtract line 14 from line 13) 15 Genter distributable net income from line 9 17 Inter the amount from line 2 18 Balance (subtract line 14 from line 16) 19 Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or line 18, whichever is less Other Information 1 Date trust was created or, if an estate, date of decedent's death long the subtraction o | | | | | - |
| 9 Enter the net short-term capital gain and 40% of the net long-term capital gain of the current tax year allocable to corpus, paid or permanently set aside for charitable purposes 10 Amounts paid or permanently set aside for charitable purposes income of a prior year (see instructions) 11 Total (add lines 8, 9, and 10). Enter here and on page 1, line 14 SCHEDULE B.—Income Distribution Deduction Check box, if Section 643(d)(3) election is made (Attach Schedule D (Form 1041)) 1 Adjusted total income (Enter amount from page 1, line 18)(if net loss, enter zero) 1 Adjusted total income (Enter amount from page 1, line 18)(if net loss, enter zero) 2 Tax-exempt interest, as adjusted (see instructions) 3 Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero 3 Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero 4 Add Schedule A, line 9, and 3' of Schedule A, line 6 5 Short-term capital gain included on Schedule A, line 1 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure 7 Total (add lines 1 through 6) 8 If amount on page 1, line 7, is a gain, enter amount here 9 Distributable net income (subtract line 8 from line 7) 10 If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income) 11 Amount of income required to be distributed currently (see instructions) 12 Other amounts paid, credited, or otherwise required to be distributed (see instructions) 13 Total (add lines 11 and 12) (if greater than line 10, see instructions) 14 Enter the total of tax-exempt income included on lines 11 and 12, as adjusted (see instructions) 15 Balance (subtract line 14 from line 16) 17 Enter the amount from line 2 18 Balance (subtract line 10 from line 16) 19 Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or line 18, whichever is less. 19 Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or | | | | | _ |
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| Instructions) 11 Total (add lines 8, 9, and 10). Enter here and on page 1, line 14 SCHEDULE B.—Income Distribution Deduction Check box, if Section 643(d)(3) election is made (Attach Schedule D (Form 1041)) 1 Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero). | | | | | _ |
| SCHEDULE B.—Income Distribution Deduction Check box, if Section 643(d)(3) election is made (Attach Schedule D (Form 1041)) 1 Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero) 1 Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero) 2 Tax-exempt interest, as adjusted (see instructions) 3 Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero 4 Add Schedule A, line 9, and % of Schedule A, line 6 5 Short-term capital gain included on Schedule A, line 1 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure 7 Total (add lines 1 through 6) 8 If amount on page 1, line 7, is a gain, enter amount here 9 Distributable net income (subtract line 18 from line 7) 10 If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income). 11 Amount of income required to be distributed currently (see instructions). 12 Other amounts paid, credited, or otherwise required to be distributed (see instructions). 13 Total (add lines 11 and 12) (if greater than line 10, see instructions). 14 Enter the total of tax-exempt income included on lines 11 and 12, as adjusted (see instructions). 15 Balance (subtract line 14 from line 13). 16 Enter distributable net income from line 9. 17 Enter the amount from line 2. 18 Balance (subtract line 17 from line 16). 19 Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or line 18, whichever is less. Other Information 1 Date trust was created or, if an estate, date of decedent's death 2 Did the estate or trust receive tax-exempt income? (If "Yes," attach a computation of the allocation of expenses). 3 If a complex trust making the section 653(b) election, check the "Yes" box. 4 Did the estate or trust receive all or any part of the earnings (salary, wages, and other compensation) of any individual by reason of a contract assignment or similar arrangement? 5 At any time dur | 10 | | 10 | | |
| SCHEDULE B.—Income Distribution Deduction Check box, if Section 643(d)(3) election is made (Attach Schedule D (Form 1041)) 1 Adjusted total income (Enter amount from page 1, line 18)(if net loss, enter zero) . | | instructions) | 10 | | _ |
| SCHEDULE B.—Income Distribution Deduction Check box, if Section 643(d)(3) election is made (Attach Schedule D (Form 1041)) 1 Adjusted total income (Enter amount from page 1, line 18)(if net loss, enter zero) . | 11 | Total (add lines 8. 9, and 10). Enter here and on page 1. line 14 | 11 | | |
| Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero). 1 Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero). 2 Tax-exempt interest, as adjusted (see instructions). 3 Net gain shown on Schedule D (Form 1041), line 17, column (a), If net loss, enter zero. 4 Add Schedule A, line 9, and % of Schedule A, line 1. 5 Short-term capital gain included on Schedule A, line 1. 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure. 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure. 7 Total (add lines 1 through 6). 8 If amount on page 1, line 7, is a gain, enter amount here. 9 Distributable net income (subtract line 8 from line 7). 9 If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income). 11 Amount of income required to be distributed currently (see instructions). 12 Other amounts paid, credited, or otherwise required to be distributed (see instructions). 13 Total (add lines 11 and 12) (If greater than line 10, see instructions). 14 Enter the total of tax-exempt income included on lines 11 and 12, as adjusted (see instructions). 15 Balance (subtract line 14 from line 13). 16 Enter distributable net income from line 9. 17 Tenter the amount from line 2. 18 Balance (subtract line 17 from line 16). 19 Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or line 18, whichever is less. Other Information 1 Date trust was created or, if an estate, date of decedent's death A count, securities account, any part of the earnings (salary, wages, and other compensation) of any individual by reason of a contract assignment or similar arrangement? 5 At any time during the tax year did the estate or trust have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country? (See the instructions for question 5). If "Yes," write the n | | Check box if Section 643(d) | | made | _ |
| 1 Adjusted total income (Enter amount from page 1, line 18)(I net loss, enter zero) 2 Tax-exempt interest, as adjusted (see instructions) 3 Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero 4 Add Schedule A, line 9, and ¾ of Schedule A, line 6 5 Short-term capital gain included on Schedule A, line 1 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure 6 Total (add lines 1 through 6) 8 If amount on page 1, line 7, is a gain, enter amount here as a positive figure 9 Distributable net income (subtract line 8 from line 7) 9 Joint a complex trust, amount of income for the tax year determined under the governing instrument (accounting income) 11 Amount of income required to be distributed currently (see instructions) 12 Other amounts paid, credited, or otherwise required to be distributed (see instructions) 13 Total (add lines 11 and 12) (If greater than line 10, see instructions) 14 Enter the total of tax exempt income included on lines 11 and 12, as adjusted (see instructions) 15 Balance (subtract line 14 from line 13) 16 Enter distributable net income from line 9 17 Enter the amount from line 2 17 Enter the amount from line 2 18 Balance (subtract line 17 from line 16) 19 Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or line 18, whichever is less. Other Information 1 Date trust was created or, if an estate, date of decedent's death long trust which exists or trust receive tax-exempt income? (If 'Yes,' attach a computation of the allocation of expenses) 16 Time during the tax year did the estate or trust have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country? (See the instructions for question 5) 16 "Yes," write the name of the foreign country low or ont the estate or trust tax year, whether or not the estate or trust the grantor of, or transferor to, a foreign trust which existed during the current tax year, whether or n | SC | | | | |
| 2 Tax-exempt interest, as adjusted (see instructions) 3 Net gain shown on Schedule D (Form 1041), line 17, column (a). If net loss, enter zero 4 Add Schedule A, line 9, and 3's of Schedule A, line 6 5 Short-term capital gain included on Schedule A, line 1 6 If amount on page 1, line 7, is a loss, enter amount here as a positive figure 7 Total (add lines 1 through 6) 8 If amount on page 1, line 7, is a gain, enter amount here 9 Distributable net income (subtract line 8 from line 7) 10 If a complex trust, amount of income for the tax year determined under the governing instrument (accounting income) 11 Amount of income required to be distributed currently (see instructions) 12 Other amounts paid, credited, or otherwise required to be distributed (see instructions) 13 Total (add lines 11 and 12) (If greater than line 10, see instructions) 14 Enter the total of fax-exempt income included on lines 11 and 12, as adjusted (see instructions) 15 Balance (subtract line 14 from line 13) 16 Enter distributable net income from line 9 17 Enter the amount from line 2 18 Balance (subtract line 17 from line 16) 19 Income distribution deduction. Enter here and on page 1, line 19, the amount on line 15 or line 18, whichever is less Other Information 1 Date trust was created or, if an estate, date of decedent's death whichever is less Other Information 1 Date trust was created or, if an estate, date of decedent's death whichever is less Other Information 1 Date trust making the section 663(b) election, check the "Yes" box. 4 Did the estate or trust receive all or any part of the earnings (salary, wages, and other compensation) of any individual by reason of a contract assignment or similar arrangement? 5 At any time during the tax year did the estate or trust have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country? (See the instructions for question 5). If "Yes," write the name of the foreign country less or other authority over a bank ac | 1 | Adjusted total income (Enter amount from page 1, line 18)(If net loss, enter zero) | | | |
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